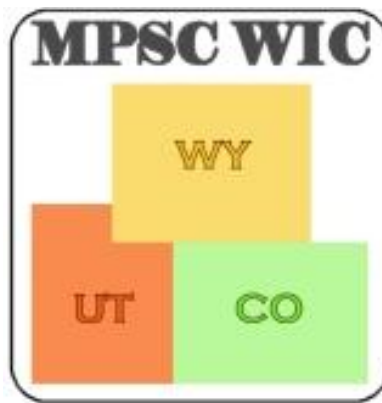# Mountain Plains States Consortium
WIC System Project

DDI DELIVERABLE #07

VM 4 VENDOR MANAGEMENT TRAINING SCREENS DFDD

(DETAILED FUNCTIONAL DESIGN DOCUMENT)

Presented to:

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Prepared by

ciber

650 Wilson Lane, Suite 200
Mechanicsburg, PA 17055
717.691.5500

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Document Revisions

Revision Date	Updated By	Requested By	Description of Revision
8/23/07	CIBER	MPSC	Revision Version
11/30/07	CIBER	MPSC	Final Version
12/21/07	CIBER	MPSC	Updated Final Version

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Table of Contents

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1   Training

The Training branch node on the Vendor Management navigation tree offers the user options for recording individual and vendor group training.

1.1   Vendor Training

The Vendor Training screen is used to record planned and completed vendor training. When training is completed, this screen allows the user to identify the number of employees from the vendor's store that attended the training. At least one representative of the vendor must participate in training annually. Annual vendor training may be provided by the State Agency in a variety of formats, including newsletters, videos, and interactive training. Prior to, or at the time of a vendor's initial authorization, and at least once every three years thereafter, the training must be in an interactive format.

> Training > Vendor Training

<Vendor Header (See VM overview)>

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Control	Description			
Record Dates	The Training record date selector allows the user to switch between training records by selecting a record date from the list. The selected record date data is displayed in the other fields on the screen.			
	Type	Record Selector (using Editable Date Picker)		
	Contents	Date of recording of Training		
	DB Column	VendorTraining.RecordedDt		
New	Clicking the New command button creates a new vendor training record.			
	Type	Command Button		
	Hot Key	Alt + N		
Edit	Clicking the Edit command button puts the currently displayed status record into Edit mode.			
	Type	Command Button		
	Hot Key	Alt + T		
Delete	Clicking the Delete command button marks the record as deleted in the database upon user confirmation.			
	Type	Command Button		
	Hot Key	Alt + D		
Training Reason	A list box containing the reasons for the vendor training.			
	Type	List Box		
	Required	Yes		
	DB Column	VendorTraining.TrainReasonCd		
	Code ID	Vendor Training		
Planned Date	The date a training session is scheduled. Defaults to current date.			
	Type	Date Picker		
	Required	Yes		
	Display Only	No	**Calculated**	No
	DB Column	VendorTraining.PlannedDt		
Alert Me	When a new training record is created, the Alert Me is checked. When checked, the training event is displayed in the Information Panel under the Alert Information Tab until the training is completed, deleted or the Alert Me checkbox is unchecked.			
	Type	Check Box		
	Display Only	No	**Calculated**	No
	DB Column	VendorTraining.TicklerIn		

Control	Description			
Interactive	Checkbox to indicate if the training is interactive. This Training Indicator is used on the TIP Report.			
	Type	Check Box		
	Display Only	No	**Calculated**	No
	DB Column	VendorTraining.InteractiveIn		
Annual	Checkbox to indicate if the training is considered to be annual training. This Training Indicator is used on the TIP Report.			
	Type	Check Box		
	Display Only	No	**Calculated**	No
	DB Column	VendorTraining.AnnualIn		
Completed Date	The date a training class was completed by the vendor.			
	Type	Date Picker		
	Required	No		
	Display Only	No	**Calculated**	No
	DB Column	VendorTraining.CompletedDt		
Number Attended	The number of employees from the vendor that attended the training session.			
	Type	Text Box		
	Required	No		
	Length	Integer 2		
	Validation	Numeric, Mask of 0-99		
	Display Only	No	**Calculated**	No
	DB Column	VendorTraining.AttendNr		
Overall Comments	Comments related to the training event in general.			
	Type	Multi Line Text Box		
	Required	No		
	Display Only	No	**Calculated**	No
	DB Column	VendorTraining.TrainComment		

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Control	Description		
Reason Comment	This textbox is used to document additional information about the training reason when the user selects "Other."		
	Type	Text Box	
	Required	Yes, when Training Reason is set to "Other."	
	Length	300	
	Validation	NA	
	Display Only	No	**Calculated**	No
	DB Column	VendorTraining.OtherReason	
Training Content	A scrollable list of checkboxes used to indicate the training content (i.e. course name) of planned or completed training for a vendor.		
	Type	Scrollable Checkbox List	
	Required	No	
	DB Column	TrainingContent.ContentCd	
	Code ID	VendTrainContent This code element is editable but these installed values are non-editable: Purpose of the WIC Program Supplemental foods authorized by State agency Reqd Min types and qtys of auth supp foods Procedures for transacting and redeeming FIs Vendor sanction system Vendor complaint process and claims Changes to pgm requirements since last training	
Training Method	A scrollable list of checkboxes used to indicate the methods of training planned or completed for a vendor.		
	Type	Scrollable Checkbox List	
	Required	No	
	DB Column	TrainingMethod.DeliveryMethodCd	
	Code ID	VendTrainDelivery	

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Control	Description		
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of the training record are displayed.		
	Type	Text Box	
	Required	No	
	Length	NA	
	Validation	Mask of 'firstname lastname mm/dd/yyyy'	
	Display Only	Yes	**Calculated** No
	DB Column	VendorTraining.ModifyStfpID + VendorTraining.ModifyDt	

Business Rules

1. When the New button is selected, the Planned Date is set to the current date.
2. If the Training Reason is "Other" then the Reason Comment is required. Display Error.
3. Completed Date cannot be prior to the Planned Date. Display Error.
4. The Alert Me indicator (VendorTraining.TicklerIn) is set when the training record is created and remains on until the training is complete or the Alert Me is deselected.
5. If no Number Attended is entered, then the number defaults to 1 when adding the training record to the vendor.
6. Number Attended cannot be > 0 if Completed Date has not been entered. Display Error.

Developer Notes

1. When the Completed Date is entered, set the VendorTraining.TicklerIn to false.

1.2   Vendor Group Training

The Vendor Group Training screen is used to credit selected vendors with training without going into each vendor record individually. The screen provides the training dates, training types, the vendors that were provided the training and the number of employees from the vendor that attended the training. Once the Assign Training command button is selected, the selected vendors are credited with the training, and the entry can be seen on each vendor's record by viewing the Vendor Training screen.

> Training > Vendor Group Training

Record Date 12/01/2007

Training Reason Follow Up Training   Reason Comment

Planned Date 12/04/2007   ☑ Alert Me   Training Content
Interactive ☐   Annual ☑
Completed Date __/__/____

Training Content:
- ☐ Purpose of the WIC Program
- ☐ Supplemental foods authorized by the State agency
- ☐ Minimum varieties and quantities of authorized supplemental
- ☑ Procedures for transacting and redeeming food instruments

Overall Comments

Training Method:
- ☐ Newsletter
- ☐ Video Tape
- ☑ Off-Site Classroom
- ☑ Train-the-trainer

Filter By Local Agency

Select All
Select None
Assign Training

Select Vendor to Include in Group Training

Local Agency ID	Vendor ID	Vendor Name	Include?	Number Attended
			☐	
			☐	
			☐	

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Control	Description			
Record Date	This date is the effective date of the training.			
	Type	Date Picker		
	Required	Yes		
	Display Only	No	**Calculated**	No
	DB Column	VendorTraining.RecordedDt		
Training Reason	A list box containing the reasons of planned or completed training for a vendor.			
	Type	List Box		
	Required	Yes		
	DB Column	VendorTraining.TrainReasonCd		
	Code ID	Vendor Training		
Planned Date	The date a training session is scheduled.			
	Type	Date Picker		
	Required	Yes – defaults to current date		
	Display Only	No	**Calculated**	No
	DB Column	VendorTraining.PlannedDt		
Alert Me	When a new training record is created the Alert Me is checked. When checked, the training event is displayed in the Information Panel under the Alert Information Tab for all selected vendors until the training is completed, deleted or the Alert Me checkbox is unchecked.			
	Type	Check Box		
	Display Only	No	**Calculated**	No
	DB Column	VendorTraining.TicklerIn		
Interactive	Check if the training is considered interactive.			
	Type	Check Box		
	Display Only	No	**Calculated**	No
	DB Column	VendorTraining.InteractiveIn		
Annual	Check if the training is considered annual training.			
	Type	Check Box		
	Display Only	No	**Calculated**	No
	DB Column	VendorTraining.AnnualIn		

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Control	Description		
Completed Date	The date a training class was completed by the vendor.		
	Type	Date Picker	
	Required	No	
	Display Only	No	**Calculated**	No
	DB Column	VendorTraining.CompletedDt	
Overall Comments	A comment related to the training event in general.		
	Type	Multi Line Text Box	
	Required	No	
	Display Only	No	**Calculated**	No
	DB Column	VendorTraining.TrainComment	
Reason Comment	This textbox is used to document additional information about the training reason when the user selects "Other."		
	Type	Text Box	
	Required	Yes, when Training Reason is set to "Other."	
	Length	300	
	Validation	NA	
	Display Only	No	**Calculated**	No
	DB Column	VendorTraining.OtherReason	
Training Content	A scrollable list of checkboxes used to indicate the training content (i.e. course name) of planned or completed training for a vendor.		
	Type	Scrollable Checkbox List	
	Required	No	
	DB Column	TrainingContent.ContentCd	
	Code ID	VendTrainContent This code element is editable but these installed values are non-editable: Purpose of the WIC Program Supplemental foods authorized by State agency Reqd Min types and qtys of auth supp foods Procedures for transacting and redeeming FIs Vendor sanction system Vendor complaint process and claims Changes to pgm requirements since last training	

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Control	Description	
Training Method	A scrollable list of checkboxes used to indicate the methods of training planned or completed for a vendor.	
	Type	Scrollable Checkbox List
	Required	No
	DB Column	TrainingMethod.DeliveryMethodCd
	Code ID	VendTrainDelivery
Filter By Local Agency	List box containing all local agencies that are currently active in the WIC system. By choosing a specific local agency the list of vendors includes only the vendors for that specific local agency. By choosing the "blank" local agency at the top of the list the filter is removed and all vendors are listed.	
	Type	List Box
	Required	No
	DB Column	LocalAgency
	Code ID	LocalAgency table lookup
Select All	The Select All command button selects (checks) the Include? Checkbox for all displayed vendors.	
	Type	Command Button
	Hot Key	Alt + L
Select None	The Select None command button deselects (unchecks) the Include? Checkbox for all displayed vendors.	
	Type	Command Button
	Hot Key	Alt + O
Assign Training	Any vendor with the Include checkbox marked will be assigned training when the Assign Training command button is clicked.	
	Type	Command Button
	Hot Key	Alt + I
Select Vendors to be Included in Group Training	The data grid used to indicate which vendors are credited with having attending the training. This grid is populated with all vendors that currently have a status of active based on the Filter by Local Agency selection.	
	Type	Data Grid

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Control	Description		
Local Agency ID	The local agency that the vendor primarily services.		
	Type	Text Box	
	Required	NA	
	Length	2	
	Validation	NA	
	Display Only	Yes	**Calculated**	No
	DB Column	LocalAgency.FFLocalAgencyID	
Vendor ID	Identification Number for the Vendor.		
	Type	Text Box	
	Required	NA	
	Length	6	
	Validation	NA	
	Display Only	Yes	**Calculated**	No
	DB Column	Vendor Display as vendor prefix number (PrefixNr) with a hyphen and then vendor number (FFVendorID).	
Vendor Name	The name of the vendor.		
	Type	Text Box	
	Required	NA	
	Length	NA	
	Validation	NA	
	Display Only	Yes	**Calculated**	No
	DB Column	Vendor.StoreName	
Include?	Check box used to indicate that the selected vendor is credited with having attended the training when the group training record is saved.		
	Type	Checkbox	
	Required	No	
	DB Column	NA	

Control	Description		
Number Attended	The number of employees that attended the training for the vendor.		
	Type	Text Box	
	Required	No	
	Length	Integer 2	
	Validation	Numeric	
	Display Only	No	**Calculated**	No
	DB Column	VendorTraining.AttendNr	
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of the training record are displayed.		
	Type	Text Box	
	Required	No	
	Length	NA	
	Validation	Mask of 'firstname lastname mm/dd/yyyy'	
	Display Only	Yes	**Calculated**	No
	DB Column	VendorTraining.ModifyStfpID + VendorTraining.ModifyDt	

Business Rules
1. Assign Training button is disabled until at least one vendor is selected (including use of Select All command button).
2. Assign Training button is disabled if all checks are removed (including use of Select None command button).
3. If the Training Reason is "Other" then the Reason Comment is required. Display Error.
4. Completed Date cannot come before the Planned Date. Display Error.
5. If a vendor is checked, but a Number Attended is not entered, then the number defaults to 1 when adding the training record to the vendor.
6. Assign Training button is disabled until the record date, training reason and planned date are filled in.
7. Display error if completed date is filled in and at least one vendor does not have an attended number greater than zero.
8. Number Attended cannot be > 0 if Completed Date has not been entered. Display Error.
9. After the Assign Training is selected, all criteria are cleared, and the Select Vendor to Include in Group Training grid is reset to all active vendors and the Include? Check boxes are cleared.
10. The Alert Me indicator (VendorTraining.TicklerIn) is set for all selected Vendors when the training record is created and remains on until the training is complete or the Alert Me is deselected.

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Developer Notes
1. Local Agency Name is populated by the join between the LA_ID of vendor table and the local agency table and returning the organization name.
2. Local Agency ID is populated by the join between the LA_ID of vendor table and the local agency table and returning the FFLocalAgencyID.
3. Vendor Number is populated by the join between the Vend_ID of the training table and the vendor table and returning the Forward Facing Vendor ID.
4. Vendor Name is populated by the join between the Vend_ID of the training table and the vendor table and returning the name.
5. In the Filter by Local Agency dropdown, display the local agency number (FFLocalAgencyID) with a hyphen and then the local agency name (LocalAgency.OrganizationNm).
6. When the Completed Date is entered, set the VendorTraining.TicklerIn to false.